



POINT PERSON USER GUIDE VIRGINIA SIS®

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Ascend provides this user guide as an overview of system operations. If you have specific questions about how to perform a function of your responsibilities, speak with your supervisor. If you have a specific question about how to maneuver through the system that is not outlined in this user guide, contact your Regional Support Supervisor.

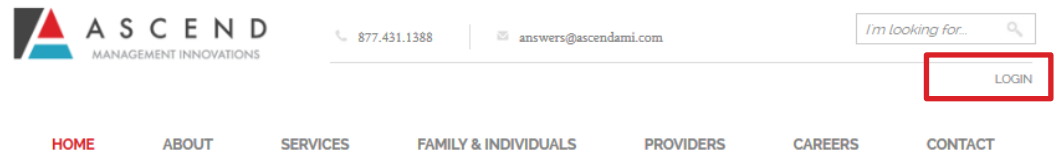
Ascend will always support the current and most recent versions of Internet Explorer and Mozilla Firefox.
Ascend recommends Adobe Reader 10 or later.

Ensure that your firewall does not block our URL.

Log In

Visit www.ascendami.com.

Click **Log In** to access the login screen (Fig. 2)

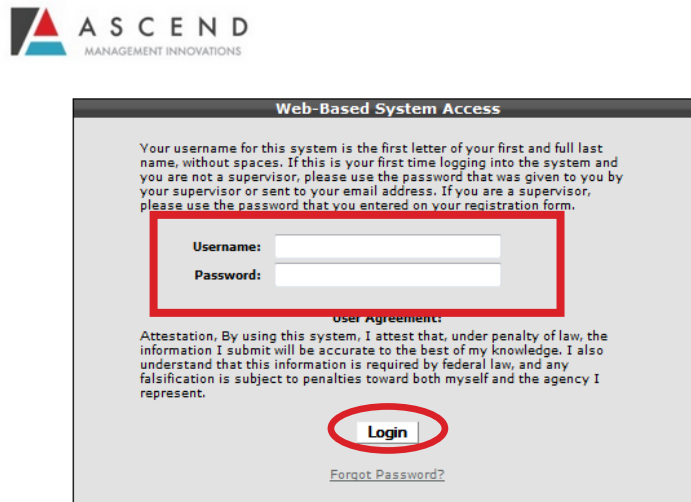


Ascend Management Innovations Home Page—Figure 1

Enter **Username** and **Password**.

Check the email you received from noreply@ascendami.com for your username.

Click **Login**.



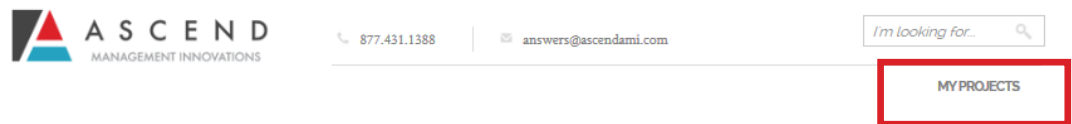
If you forget your password, or it does not work as you believe it should, click the **Forgot Password** link to reset it.

Login Screen—Figure 2

The system will bring you back to the Ascend Management Innovations Home page (Fig. 1).
 The **Log In** link becomes the **My Projects** menu (Fig. 3).

Click **My Projects**.

Select **Virginia Support Coordinator** to open the **CSB Point Person Queue** (home page) (Fig. 15).



Ascend Management Innovations Home Page—Figure 3

Navigation

<div>Home</div> <div>Figure 4</div>	<div>Search</div> <div>Figure 5</div>	<div>SC User Manager</div> <div>Figure 6</div>
Return to the CSB Point Person Queue	Search for an Individual	Access Support Coordinators in CSB

Sorting: Click any column header to sort the table by that field.

Enter SISOnline User Name

Only complete once or with a change in user name.

Enter your **SISOnline User Name** in the **red box** in the upper right corner of the page.



Home Search SC User Manager

VA SIS Application
 Log-out
 Point Person: Stephanie Pettitt
 SISOnline User Name:

This will save automatically. If your SISOnline User Name changes, you can update this box at any time.

Page Header—Figure 7

Add New Supports Coordinator Users

To add a new Supports Coordinator to the system

Click **SC User Manager** in the navigation menu (**Fig. 6**) to open the **SC User Manager** (**Fig. 9**).



Home Search **SC User Manager**

Navigation Menu—Figure 8

Click **Add a New User** to open the **Add New User** form (**Fig. 10**).

SEARCH SUPPORT COORDINATORS

Show 25 entries Showing 1 to 22 of 22 entries Filter: **Add a New User**

ID	Last Name	First Name	Username	Email	Last Updated	Access Level	Status
278	Cardone	Deana	dcardone	dgarrott@ascendami.com	3/27/2015 1:36:00 PM	Support Coordinator	Active
5233	Edwards	Sonya	soedwards	sedwards@ascendami.com	2/3/2015 11:11:00 AM	Point Person	Active
5727	Burns	Jennifer	jeburns	jeburns@ascendami.com	3/12/2015 12:16:00 PM	Point Person	Active
14818	Rogers	Shane	srogers	srogers@ascendami.com	1/21/2015 3:18:00 PM	Point Person	Active

User Manager—Figure 9

Complete the **Add New User** form.

Click **Save User** to save the information and add the user to the system

OR

click **Return to User Listing** to cancel the form.

ADD NEW USER

USER

First Name: Last Name:

Phone: Alternate Phone:

Fax:

Email: Email (repeat):

Address:

City, State, Zip:

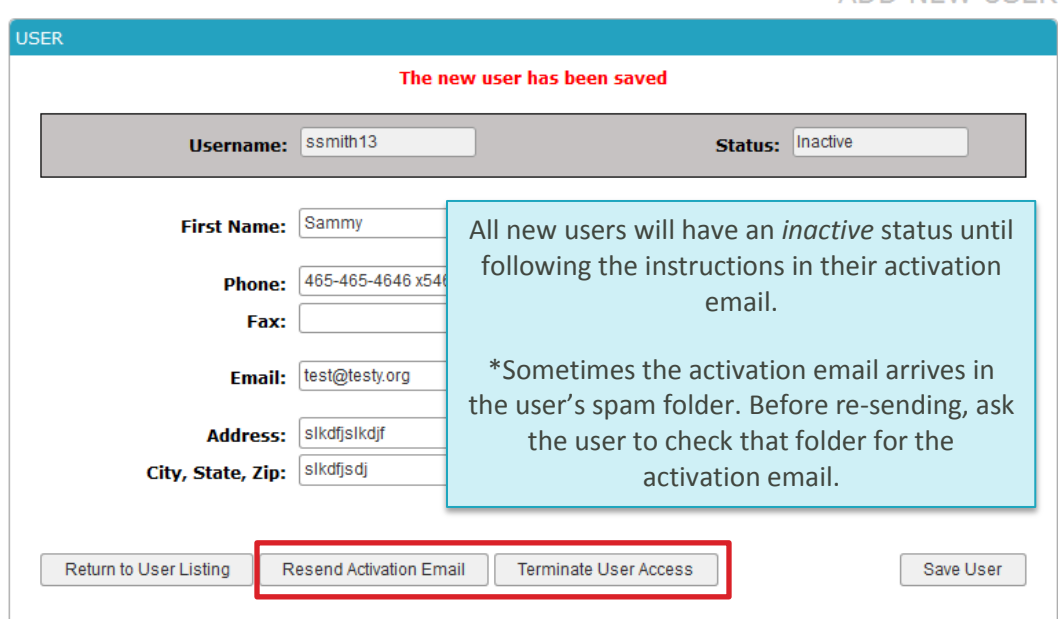
Return to User Listing **Save User**

Add New User Form—Figure 10

The system will show the **Username** and **Status** for the newly added user. The user will receive an email with activation instructions.

Click **Resend Activation Email** if the person does not receive the email.*

Click **Terminate User Access** to end system access for a user. **This action cannot be un-done. Confirm you want to end user access before saving.**



USER

The new user has been saved

Username: ssmith13 **Status:** Inactive

First Name: Sammy

Phone: 465-465-4646 x546

Fax:

Email: test@testy.org

Address: slkdjfsldjfd

City, State, Zip: slkdjfsdj

Buttons: Return to User Listing, Resend Activation Email, Terminate User Access, Save User

All new users will have an *inactive* status until following the instructions in their activation email.

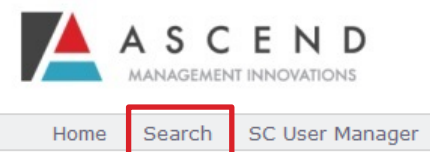
 *Sometimes the activation email arrives in the user's spam folder. Before re-sending, ask the user to check that folder for the activation email.

Add New User Form—Figure 11

Search for Individual

To search for a specific person

Click **Search** in the navigation menu to perform a search for an individual (**Fig. 13**).



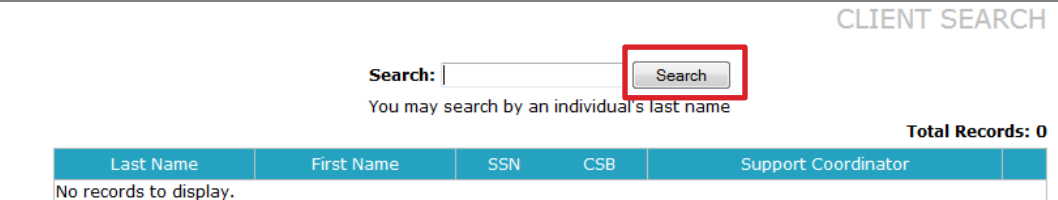
ASCEND
MANAGEMENT INNOVATIONS

Home **Search** SC User Manager

Navigation Menu—Figure 12

Enter the **search parameter: Individual's last name**.

Click **Search** to find results containing the search parameter.



CLIENT SEARCH

Search: [] **Search**

You may search by an individual's last name

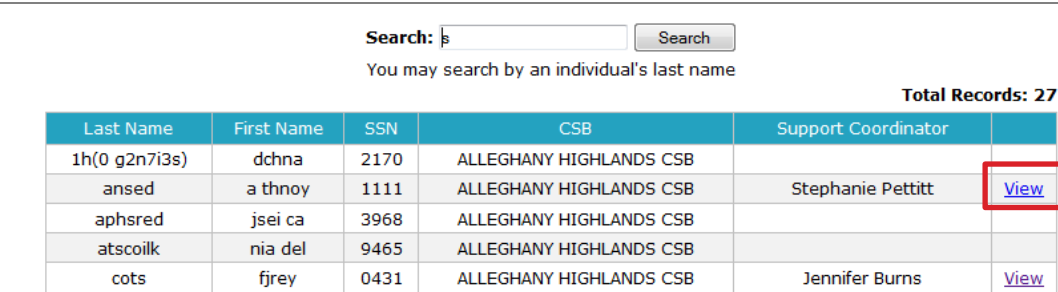
Total Records: 0

Last Name	First Name	SSN	CSB	Support Coordinator
No records to display.				

Search Query—Figure 13

All records associated with your search will appear. Only records associated with your CSB will display.

Click **View** to open the individual's record.



CLIENT SEARCH

Search: s **Search**

You may search by an individual's last name

Total Records: 27

Last Name	First Name	SSN	CSB	Support Coordinator	
1h(0 g2n7i3s)	dchna	2170	ALLEGHANY HIGHLANDS CSB		
ansed	a thnoy	1111	ALLEGHANY HIGHLANDS CSB	Stephanie Pettitt	View
aphsred	jsei ca	3968	ALLEGHANY HIGHLANDS CSB		
atscoilk	nia del	9465	ALLEGHANY HIGHLANDS CSB		
cots	fjrey	0431	ALLEGHANY HIGHLANDS CSB	Jennifer Burns	View

Search Query—Figure 14

Assign New SC

From the CSB Point Person Queue/Home Page

Select the **Support Coordinators** dropdown to filter Individuals by SC.

Click the **Assign New SC** dropdown.


Select the **SC's name** from the dropdown list.


Assign SCs for every individual in the queue. The system will move the individual into the newly assigned SC's queue.

Scroll to the bottom of the page.

Click **Save** when you finish assigning new SCs.

CSB POINT PERSON QUEUE

Support Coordinators: View All  Total Records: 12


Individual First Name	Individual Last Name	SSN	DOB	Assigned SC	Assign New SC	
gdwiht	yo	4273	06/29/1956	Shane Rogers		View
fjrey	cots					View
aid v	igltnr					View
a gren	jkaocsn					View





If the SC is not in the dropdown, add the SC through the SC User Manager.

Danny Bates (inhouse)
Jennifer Burns
 Jennifer Burns
 JenTest BurnsTest

CSB Point Person Queue—Figure 15

CSB POINT PERSON QUEUE

Support Coordinators: View All  Total Records: 12

Individual First Name	Individual Last Name	SSN	DOB	Assigned SC	Assign New SC	
gdwiht	yo	4273	06/29/1956	Shane Rogers		View
fjrey	cots	0431	10/04/1966	Jennifer Burns		View
a thnoy	ansed	1111	01/06/1984	Stephanie Pettitt		View
ilsne y	liedy	0454	03/26/1986	Tony Veach		View

Save


CSB Point Person Queue—Figure 16



Accessing the Individual's Record

From the CSB Point Person Queue (Home page):

Click **View** to open the record (Fig. 18).

CSB POINT PERSON QUEUE

Support Coordinators: View All  Total Records: 12

Individual First Name	Individual Last Name	SSN	DOB	Assigned SC	Assign New SC	
gdwiht	yo	4273	06/29/1956	Shane Rogers		View
fjrey	cots	0431	10/04/1966	Jennifer Burns		View

CSB Point Person Queue—Figure 17

If acting as an SC, you can add location and respondent information using the following instructions:

Complete the **demographic information**.

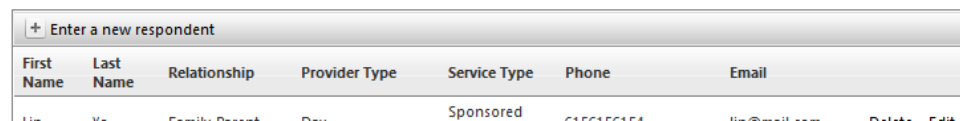
INDIVIDUAL INFORMATION

INDIVIDUAL: GDWIHT YO

Provide the following information for the selected Individual:
 Address:
 City: State: TN Zip:
 CSB Tracking #: SSN: 000-00-4273 Medicaid ID:

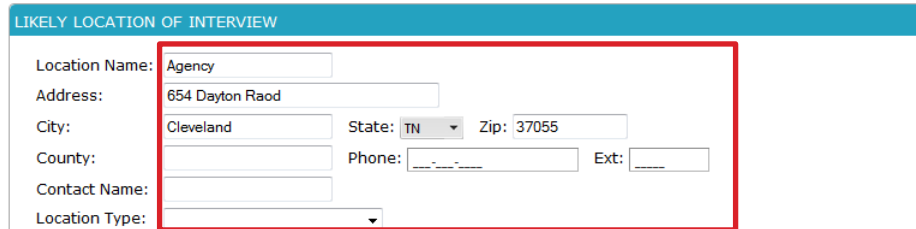
Individual Information—Figure 18

Enter a new **respondent**. Follow the instructions in the **Enter Respondent Information** section (Figs. 23–30).



Individual Information—Figure 19

Enter the **Likely Location of Interview** information.

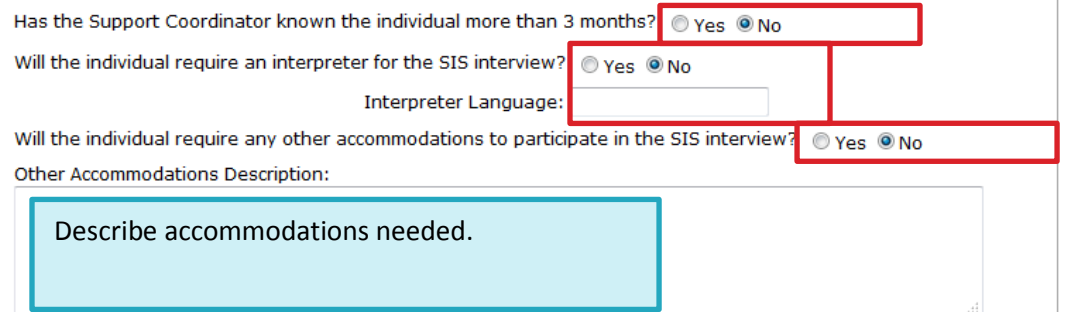


Individual Information—Figure 20

Indicate if you have known the person more than **3 months**.

Indicate if an **interpreter** is needed, and for **which language**.

Indicate if other **accommodations** are needed and describe the accommodations.

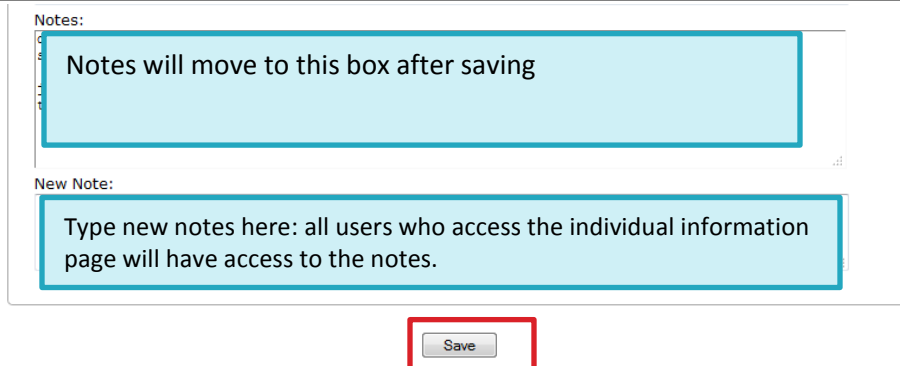


Individual Information—Figure 21

Enter any **notes** to save to the record.

*Type the note in the **New note:** box. After saving, the note will move to the **Notes:** box above.*

Click **Save** to save all added information.

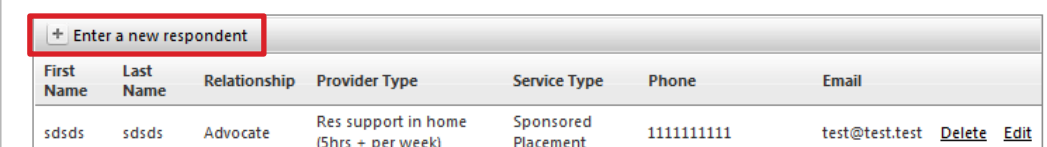


Individual Information—Figure 22

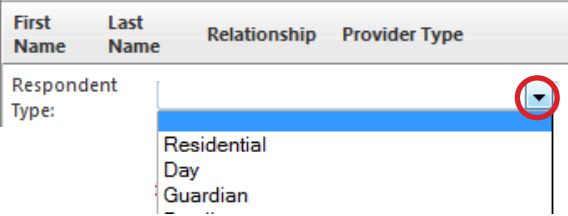

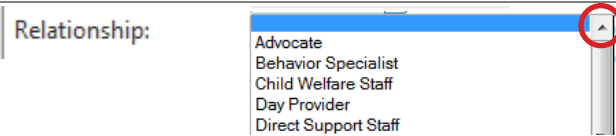
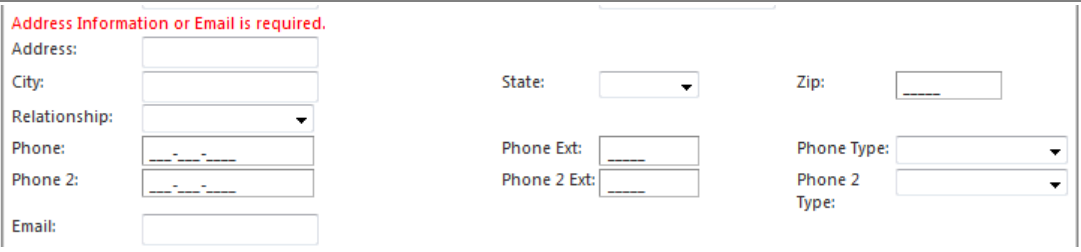
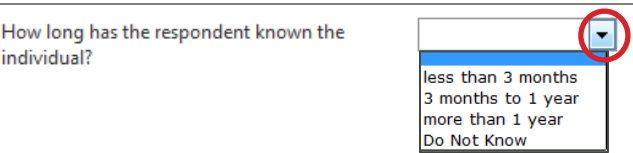
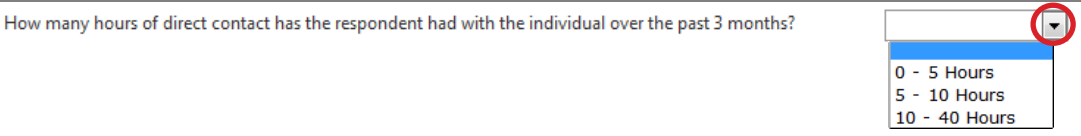
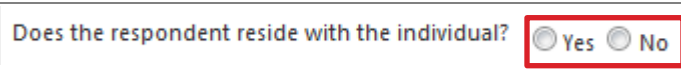
Enter Respondent Information

From the Individual Record

Click **Enter a new respondent** to open the respondent grid (Fig. 24) to add respondent information.



Individual Information—Figure 23

Select the Respondent Type from the dropdown.		<div style="border: 1px solid black; padding: 5px;"> <p>The form options are dynamic, and will change based on the respondent type selected. Be sure to complete all fields.</p> </div> <p style="text-align: right;">Respondent Grid—Figure 24</p>
Enter the respondent's first and last name .	 <p style="text-align: right;">Respondent Grid—Figure 25</p>	
Select the respondent's relationship to the individual from the dropdown.	 <p style="text-align: right;">Respondent Grid—Figure 26</p>	
Enter the respondent's contact information . <i>Ascend will confirm and schedule the Respondents participating in the SIS® using the provided contact information.</i>	 <p style="text-align: right;">Respondent Grid—Figure 27</p>	
Indicate how long the respondent has known the individual .	 <p style="text-align: right;">Respondent Grid—Figure 28</p>	
Select the number of direct contact hours with the individual over the past 3 months.	 <p style="text-align: right;">Respondent Grid—Figure 29</p>	
Indicate if the respondent resides with the individual.		

Click **Save** to insert the respondent information in the respondent grid.

INDIVIDUAL INFORMATION

Please enter the following information for the selected individual:

Address: [Street Name] [City] [State] [Zip]

CSB Tracking #: [CSB] SSN: [SSN] DOB: [DOB] Mailed ID: [Mailed ID]

Enter a new respondent:

First	Last	Relationship	Provider Type	Service Type	Phone	Email
[First Name]	[Last Name]	[Relationship]	[Provider Type]	[Service Type]	[Phone]	[Email]

How long has the respondent known the individual? [Days] [Months] [Years]

How many hours of direct contact has the respondent had with the individual over the past 6 months? [Hours]

Does the respondent reside with the individual? ☐ Yes ☐ No

Save **Cancel**

LIKELY LOCATION OF INTERVIEW

Location Name: [Agency]

Address: [CSB Center Point] [City] [State] [Zip]

County: [County] Phone: [Phone] Fax: [Fax]

Location Type: [Location Type]

Has the Support Coordinator known this individual more than 3 months? ☐ Yes ☐ No

Will this individual require interpretation for the CSB interview? ☐ Yes ☐ No

Interpreter Language: [Language]

Will this individual require other accommodations for the CSB interview? ☐ Yes ☐ No

Other Accommodations Description: [Text Area]

Notes: [Text Area]

Save

You must click **Save** to insert the respondent information in the grid.

Respondent Grid—Figure 30

Submit Record for Scheduling

From the CSB Point Person Queue (home page).

After entering demographics, respondent information, and likely location of interview, submit the information to Ascend scheduling using these steps:

Click the **Send to Scheduling** checkbox in the **CSB Point Person Queue** (home page).

Click **Save** to send the completed information to Ascend for scheduling.

Total Records: 2

Individual First Name	Individual Last Name	SSN	Assign New SC	Sent To Scheduling Date	Send To Scheduling	
rd beun	iknc	3185	<input type="text"/>		<input checked="" type="checkbox"/>	View
dnl ya	dwons	8924	<input type="text"/>		<input type="checkbox"/>	View

Save

CSB Support Coordinator Queue—Figure 31

The **Sent to Scheduling Date** will be saved on the grid.

Your changes have been saved.

Total Records: 2

Individual First Name	Individual Last Name	SSN	Assign New SC	Sent To Scheduling Date	Send To Scheduling	
rd beun	iknc	3185	<input type="text"/>	04/03/2015	<input checked="" type="checkbox"/>	View
dnl ya	dwons	8924	<input type="text"/>		<input type="checkbox"/>	View

Save

CSB Support Coordinator Queue—Figure 32

Log Out

Click **Log-out** to end your session.

Failure to logout can cause a record to remain locked for up to two hours. This means that no one else can work in the individual's record during that time.



Home Search SC User Manager

VA SIS Application

Log-out

Point Person: Stephanie Pettitt

SISOnline User Name: [Please enter here.](#)

Failure to logout can cause a record to remain locked for up to **two hours**.

Page Header—Figure 33